

MONETISATION & FINANCE

i2i Collections

Dunning rules and collection worklists for overdue ISP accounts

OVERVIEW

i2i Collections is the dunning engine and the Payments & Collections screens of the i2iCore billing stack. An operator writes rules that say when to act on an account, such as service expiry, a payment due date or an overdue invoice, and what to do: send an SMS, WhatsApp message or email, bar or suspend the service, or raise a task.

Around the rules sit the working screens. Overdue accounts appear in worklists for barred, active overdue and upcoming renewal customers, with ageing buckets. Staff record a payment, log a follow-up with notes, and hand field cash over for authorisation. Partners can see the dunning cases raised against their own customers.

THE CHALLENGE

Overdue accounts cost an ISP twice: the revenue is late, and staff spend hours deciding whom to call. Reminders sent by hand are inconsistent, suspension timing upsets customers, and cash collected in the field is hard to account for. Operators need rules they can test and worklists that show age and amount.

AT A GLANCE

- ✓ Rules by trigger, threshold and an ordered list of actions
- ✓ Worklists for barred, overdue and upcoming-renewal accounts
- ✓ Exclusions that record why an account was skipped
- ✓ Preview a rule before it runs

Capabilities

Rule engine

Each rule combines a trigger event, a threshold and an ordered set of actions. Triggers include service expiry approaching or reached, payment due in a number of days, overdue payment, unpaid invoice count and quota balance. Rules can be created, edited, searched and switched on or off.

- Customer type and dunning category per rule
- Default notification templates for payment due and overdue

Actions and channels

Actions include SMS, WhatsApp, email and in-app messages, telecall, field and device-recovery tasks, restriction, suspension and deactivation, partner notification and escalation to a manager. Messages use the platform notification templates.

Barring window and exclusions

A barring window defers suspension to allowed days and times. Exclusions apply globally, per trigger or per rule, at customer or partner level, and require a reason. Accounts on auto-renewal are skipped by pre-expiry reminders.

Dry-run checks

Preview, impact and coverage endpoints show which customers a rule would reach before it is switched on, so thresholds and exclusions can be tuned on real data.

Dunning cases

The engine keeps one open case per customer account, with the rules and actions that matched. Cases can be searched and exported to CSV, and they close when the invoices are settled. Partners see their own customers' cases read-only.

Payments & Collections screens

Worklists show barred, active overdue and upcoming renewal accounts with ageing buckets and summary cards. Staff collect payment by cash, cheque, online or other, and administrators authorise online, cash, cheque and refund payments, with reject and remark.

Cash and follow-ups

Field collections credit a staff cash wallet, and Receive Cash settles it after authorisation. Follow-ups are assigned to staff, carry a notes timeline and keep assignment history.

Technical summary

RULE MODEL	Trigger event, threshold value and ordered actions, per customer type and dunning category.
CHANNELS	SMS, WhatsApp, email and in-app messages through the platform notification templates.
SERVICE ACTIONS	Restriction, suspension and deactivation through account status change, deferred by the barring window.
EXCLUSIONS	Global, per trigger or per rule; customer and partner level; reason recorded; auto-renewal accounts skipped by pre-expiry triggers.
DRY RUN	Preview, impact and coverage checks per rule.
WORKLISTS	Barred, active overdue and upcoming renewal, with ageing buckets and summary cards.
COLLECTION	Collect payment by cash, cheque, online or other; payment authorisation; staff cash wallet with Receive Cash.
EXPORT	CSV export of dunning cases.
INTERFACES	REST under /cbss/dunning, /cbss/outstanding, /cbss/followup and /core/collections; runs inside the billing service on MySQL.

Related modules

Modules operators often run alongside i2i Collections. Each is a separate module; the integrations that exist are listed in the technical summary above.



Where it is used

Reminders before and after the due date

A prepaid ISP sends a reminder when a plan is about to expire and another once it has expired. Customers on auto-renewal are left out of the pre-expiry reminders. Postpaid customers get a message a few days before the due date and again when the invoice is overdue.

Barring inside a safe window

An operator wants to suspend accounts that stay overdue, but not at night or on days when the call centre is closed. The rule carries a barring window with allowed days and times, and the suspension waits until the window opens.

Protecting sensitive accounts

A partner asks that a few of its customers are not chased during a dispute. The operator adds an exclusion at customer or partner level with a reason. The engine still records each excluded match, so the decision can be reviewed later.

See i2i Collections on your network

Talk to our team about your operator type, your network and where to start. We will show you the module and answer the technical questions.

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